

Updated Resources for the Alaska Release

Introduction

This is a summary of the resources that were updated because of the enhancements made to SES in the Alaska release (December 5, 2022).

- Agency Resources
- Company Resources
- Other Resources

Agency Resources

- Adding Participants to a Supervisory Activity: Linked to new Adding Participants to a Closed and Locked SA to Download SA Documents topic.
- Adding Participants to a Closed and Locked SA to Download SA Documents: New topic created for this release.
- <u>Bulk Downloading Supervisory Activity Documents</u>: Updated to include information about expanded download permissions and accessing downloads after an SA is closed and locked.
- <u>Completing Preliminary Review of a Complaint</u>: Added information about Complaints POC and Supervisors getting notifications when preliminary review of a complaint is completed.
- <u>Deleting Findings</u>: Updated to include expanded permissions that the creator of a finding can now delete a finding.
- Reviewing QuickIR Responses Sent by a Company: New topic created for this release.
- <u>Uploading Loan Requests (in Bulk)</u>: Updated to include information about the change from .csv to .xlsx for the loan request bulk upload template. Also new fields are available in the loan request bulk upload template: Loan Type and Comments.
- SES Account Creation for Entities Not Managed in NMLS
- SES Complaints More about Consumer Complaint Subjects
- SES Agency FAQs
 - The three topics above were all updated to include information about the data source for depository institutions no longer coming from NMLS, but instead from MicroStrategy and the National Information Center (NIC) database.

Company Resources

<u>Exporting a List of Information Requests</u>: Updated with expanded permissions where all
active participants on an SA can now export a list of information requests.

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- Exporting Loan Requests: Updated with expanded permissions where all active participants on an SA can now export a list of loan requests.
- Reviewing QuickIR Responses Sent to the Agency: New topic created for this release.
- <u>SES Industry FAQs</u>: Updated to include information about the data source for depository institutions no longer coming from NMLS, but instead from MicroStrategy and the National Information Center (NIC) database.

Other Resources

- <u>SES Email Notifications</u>: Updated to include notification sent to staff users from the lead agency when a finding is deleted. Also, the agency Complaints POC and Complaints Supervisors receive a notification when preliminary review of a complaint is completed.
- <u>SES Agency System Roles & Consumer Complaints Roles</u>: Updated Excel spreadsheet of detailed role permissions.
- <u>SES Hours of Operation</u>: Updated hours of operation for SES.

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